

REQUEST FOR PROPOSALS

FOR A REVIEW AND UPDATE OF
THE RURAL MUNICIPALITY OF VICTORIA, PRINCE EDWARD ISLAND
OFFICIAL PLAN
AND
ZONING AND SUBDIVISION CONTROL (DEVELOPMENT) BYLAW

PROPOSALS DUE: June 14, 2019

1.0 GENERAL

The following is a request for proposals for the provision of planning services to the Rural Municipality of Victoria. The requirements of the submission are outlined in Section 4 – Proposal Requirements and Evaluation, and the requirements and objectives of the project are outlined in the Terms of Reference.

1.1 Definitions

The Municipality:	Rural Municipality of Victoria, Prince Edward Island.
The RFP:	This Request for Proposals for the provision of planning services.
The Proponent:	The firm submitting a proposal in response to this RFP.
The Project:	The work and services that are described in the Scope of Work of this Request for Proposal.

1.2 Introduction

The Rural Municipality of Victoria is requesting proposals from qualified proponents for the provision of planning services to undertake a review and update of the Municipality's Official Plan and Zoning and Subdivision Control (Development) Bylaw.

1.3 Context

Victoria is a centrally located seaside village on the south shore of western Queens County, just off the TCH Route 1. The municipality is ideally situated halfway between Charlottetown and Summerside, and 20km from the Confederation Bridge,

The Municipality has a land mass of 346 acres, 49% of which is zoned agricultural and 25% residential according to the 2014 Official Plan. The population of Victoria has increased slightly in the last five years and is currently comprised of approximately 100 full time residents and 35 summer residents.

Victoria is a vibrant engaged community which values its rich heritage and unique rural setting. The central core area is laid out in a grid pattern with 3 streets running north and south and three streets running east and west.

Fishing and farming have historically been the major trades in Victoria however tourism has developed significantly in the past twenty years and Victoria has become a busy tourism destination during the summer months. Artists and craftspeople have set up home based businesses in the central core and along with the development of a summer theatre festival in the community hall have contributed to Victoria becoming a cultural hub of the South Shore.

Victoria is home to:

- 30 small businesses, several of which are home-based arts/craft businesses
- 6 eating establishments
- 6-8 tourist accommodations including a hotel, cottages, B&Bs, and summer home rentals
- An active Historical Society, Women's Institute, social clubs and seniors activities
- Annual community celebrations: Victoria Day potluck, Croquet tournament, etc

All this economic and social activity plus summer waterfront activities contribute to making the community an attractive place to live, work and visit.

Victoria also has two industrial enterprises located on its east and west borders.

Victoria currently faces several challenges: managing its success as a tourist destination, maintaining a healthy balance between residential and commercial development, preserving its heritage identity, and attracting younger full time residents to the community.

Local governance is provided by a Mayor and Municipal Council with day to day management provided by a Chief Administrative Officer.

The municipality is responsible for the provision of the following services:

- Sewer Treatment and Collection and Central Water Supply
- Fire Protection
- General Government and Administration Services (including Subdivision, Land Use and Development Control)
- Public Works and Maintenance Services (all road maintenance activities provided by the Province of PEI)
- Provision and maintenance of parks and green space

The Municipality's Official Plan and Development Bylaw are implemented through the office of the Chief Administrative Officer and supplemented with external consulting services as required.

2.0 INSTRUCTIONS TO PROPONENTS

2.1 Submission

The proponents shall submit, by electronic means, a proposal clearly labeled with the proponent's name and address, and the name of the project: "Review and Update the Municipality of Victoria Official Plan and Development Control Bylaw".

Proposals shall be submitted by attaching two files. The first file shall include the technical proposal and the second file shall include the financial proposal. Each file shall be clearly marked as to its contents.

The proposals are to be submitted to:
victoriamunicipalitypei@gmail.com

Attention: Michelle MacCallum, Chair, Planning Committee, Rural Municipality of Victoria

No later than 4:00 pm on June 14, 2019

2.2 Contact and Addenda

All inquiries concerning this Request for Proposal are to be directed to:

Michelle MacCallum, Chair, Planning Committee, Rural Municipality of Victoria

Email: mmacallum67@gmail.com

****Please note that the Municipality Office will not be staffed between May 17, 2019 and June 3, 2019, so all inquiries are to be directed to Michelle MacCallum the above email address.***

To ensure consistency and fairness to all proponents, the municipality will use written addenda to issue any clarifications or provide any further information in relation to this Request for Proposals. Any inquiries must be received by 4pm on May 20, 2019.

Any and all addenda will be published on the Province of PEI Tendering website (<https://www.princeedwardisland.ca/en/tenders>) by May 22, 2019. It is the responsibility of proponents to check the PEI Tendering website for any addenda to this Request for Proposals.

2.3 Proponents Requirements

The successful proponent shall be required to be registered to carry on business in accordance with applicable laws of the Province of Prince Edward Island. The proposed Project Lead for the proponent's project team and the project team member who will serve as the Project Lead in case of a contingency ***must be a full Member of the Canadian Institute of Planners (MCIP) prior to the submission of a proposal.***

3.0 TERMS AND CONDITIONS

- Submission of a proposal constitutes acknowledgement that the proponent has read and agrees to be bound by all the terms and conditions of this Request for Proposals and any addenda issued in relation to this Request for Proposals.
- The Municipality will not make any payments for the preparation of a response to this Request for Proposal. All costs incurred by the proponent will be borne by the proponent.
- This is not an offer. The Municipality of Victoria does not bind itself to accept the lowest price or the highest score of any proposal submitted.
- The Municipality has the right to cancel this Request for Proposal at any time and to reissue it for any reason whatsoever, without incurring any liability and no proponent will have any claim against the Municipality as a result of the cancellation or reissuing of the Request for Proposals.
- If a contract is to be awarded as a result of this Request for Proposal, it will be awarded to the proponent whose proposal, in the Municipality's opinion, provides the best potential value to the Municipality and is capable in all respects to perform fully the contract requirements and the integrity and reliability to assure performance of the contract obligations.
- If the Municipality decides to award a contract based on a submission received in response to this Request for Proposal, the successful proponent will be notified of the intent to award in writing. Proponents will not acquire any legal or equitable rights or privileges whatsoever until the contract is signed by both parties.
- In the event of any inconsistency between this Request for Proposal, and the ensuing contract, the contract shall govern.
- The Municipality reserves the exclusive right to determine the qualitative aspects of all proposals relative to the evaluation criteria.
- Proponents may not amend their proposal after the closing date and time but may withdraw their proposal at any time prior to acceptance by the Municipality and issuing of a Letter of Intent.
- Proposals will be evaluated as soon as practicable after the closing time. No detail of any proposal will be made public except the names of all parties submitting proposals.
- The proposal, accompanying documentation, and any project reports, drawings, etc. submitted by the proponents are the property of the Municipality and will not be returned.

3.1 Validity of Offer

The proposals shall remain open for acceptance for a period of not less than sixty (60) days from the closing date of this Request for Proposal.

4.0 PROPOSAL REQUIREMENTS AND EVALUATION

The Technical Proposal shall include all the information required to evaluate the proposal with the exception of the financial component.

The Technical Proposal will be used to evaluate the proponent's understanding of the project and methodology, and ensure they propose to meet the Terms of Reference and provide the required deliverables. It will also be used to evaluate the proponent's experience, and project team.

The requirements of this project are outlined in Section 6 -Terms of Reference.

4.1 Understanding of the Project

The proponent should demonstrate an understanding of the objectives of the work, technical requirements, constraints, selection of resources, and any special considerations associated with the project. The proponent should provide a description of the specific project objectives and technical requirements, highlighting those that are of particular significance to the project and delivery of services.

4.2 Work Plan/Project Methodology

The proponent shall provide a detailed work plan, which demonstrates the proposed project methodology. The work plan should demonstrate the proponents understanding of the project and its major challenges. It should describe how the proponent proposes to meet the objectives of the project and the requirements of the Terms of Reference, and provide the deliverables specified.

The work plan is the proponent's opportunity to present their project methodology as well as showing an understanding of the project. It is also their opportunity to present innovative ideas or approaches to the project.

4.3 Qualifications and Experience of Firms

The proponent shall present the firm(s) who shall comprise the Project Team. The prime consultant

and any sub-consultants shall be identified, and the roles of all firms shall be described.

The proponent must demonstrate previous experience on projects of a similar scope and scale. A description of maximum of five (5) projects completed by the prime consultant, and three (3)

for each sub-consultant shall be included. Descriptions of projects shall be limited to two single sided pages each including photographs and graphics.

The project descriptions should include:

- description of the project, including anticipated deliverables and outcomes
- key personnel and their roles and responsibilities on the project,
- client reference, including client name, email address and telephone number.

4.4 Project Team

The proponent shall present the Project Team's key personnel, including their roles and responsibilities, including the identification of the Team Lead and the project team member who will act in the capacity of the team lead in case of a contingency.

The proponent should demonstrate the experience and qualifications of the project team members to provide the services to fulfill the objectives and scope of work of this project as set out in the Terms of Reference. Their experience on similar projects should be demonstrated.

The Project Team should demonstrate combined qualifications and experience in relation to land use planning including: data collection and management; visual analysis and GIS mapping; public engagement and community consultation; heritage preservation; demographic, economic and intensification analysis; and policy formulation and implementation.

Curriculum vitae for each project team member and backup should be included. The qualifications and experience of each project team member shall be considered in the evaluation.

Information to be included for each project team member should include:

- Name
- Education (relevant)
- Work Experience
- Similar projects involved and role in this project
- Licensing, certification and/or authorization

4.5 Past Performance and References

As part of the evaluation of the submission, the Municipality shall review the proponents past performance on similar projects and their references from other clients for similar or related projects.

References shall be obtained from the descriptions of similar projects provided as part of Qualifications and Experience of Firm(s).

4.6 Project Schedule

The proponent shall provide a detailed schedule that identifies how and when the services shall be conducted, individual responsibility for each service, and demonstrate the project can be completed within the allotted time frame and within budget.

The project schedule will be evaluated based on how closely it meets the project requirements, and how it demonstrates a logical approach to delivering the required services.

4.7 Financial Proposal

The financial proposal shall be submitted as a separate file. The file shall be clearly marked "Financial Proposal" and include the project title.

The financial proposal shall include a breakdown of all fees in the form of a Fee Schedule. The Fee Schedule shall be a matrix with project tasks on the vertical axis, and project personnel on the horizontal axis.

The Fee Schedule shall show the corresponding value of work for each Project Team member and the disbursements relating to each task. In addition, per diem rates shall be provided for all Project Team members.

Disbursements will be reimbursed at cost and must be job related. Backup documentation for all disbursements is to be submitted with each invoice. Operating and overhead expenses will not be considered as a disbursement.

The following are examples of acceptable and unacceptable disbursements:

Acceptable Disbursements: Travel

Accommodations Meals Printing and Reproduction Communications (telephone bills)

Unacceptable Disbursements: AutoCAD Charges

Computer Charges Equipment Charges (unless clearly identified in proposal)

4.8 Evaluation of Proposals

The evaluation of the proposals shall be based on the factors presented as follows:

Rating Factors Weight Factor

- Demonstrated understanding of the Project scope: 5
- Work Plan/Project Methodology: 30
- Qualifications and Experience of Firms: 15

- Project Team 15
- Past Performance and References 10
- Project Schedule 5

Subtotal Technical Submission 80

- Cost of Services 20

MAXIMUM TOTAL POINTS 100

4.9 Proposal Submission Format

Submissions shall meet the following formatting or they may not be evaluated.

- Can be printed on paper Size - 8 1/2" x 11";
- Minimum font size - 11-point Times or equal;
- Minimum margins - 12 mm top, bottom, left, and right;

5.0 TERMS OF PAYMENT

The selected proponent shall be reimbursed 50% up front, 25% upon acceptance of a first draft by Council, and the final 25% upon Council approval of final plan document. The invoice shall include the project title and a billing summary.

No payment will be made for the cost of work incurred to remedy errors or omissions for which the consultant is responsible.

6.0 TERMS OF REFERENCE

6.1 Background

In 2002, Victoria approved the first Official Plan and Zoning & Subdivision Control bylaw. These documents were prepared with public consultation and represented a comprehensive planning framework for the Municipality. The Official Plan addressed residential development; commercial development; tourism; central sewage collection and treatment; central water supply; storm water management; solid waste management; fire protection services; streets, roads and sidewalks; ground and surface water protection.

The bylaw divided the Municipality into the following development zones: Single Family Residential (R1); Rural Residential (RR); Environmental Reserve (ER1) Commercial (C1); Light Industrial (L1); Agricultural (A1); Institutional (II); Parks and Recreation (PR1); and Municipal (M1).

The last legislated Official Plan and Development Bylaw review for the Municipality of Victoria was completed and adopted in 2014. Several updates to the Development Bylaw were made in 2016 but were not significant in nature, the 2016 amendments included clarification around several definitions and other minor 'housekeeping' items.

6.2 Deliverables

The deliverables to be completed by the selected proponent as part of this project is summarized in the following sections. This scope of services is not to be considered all-inclusive. Tasks required to meet the project objectives will be considered to be required under this Terms of Reference unless they are deemed unforeseeable or are required to meet expanded project objectives.

The overall objective of the project is to review and update Victoria's Official Plan and Development Bylaw based on technical analysis and stakeholder input, and in compliance with the Planning Act and applicable Regulations. The scope of work includes the following high-level deliverables:

- Under the guidance of the Planning Committee, undertake a public consultation process to ensure meaningful feedback from the public, residents, business owners & operators and public and private developers informs the content of a revised Official Plan and Development Bylaw;
- Assess the amount and characteristics of land supply in relation to residential, commercial, industrial, agricultural, institutional and recreational trends and needs in the Municipality of Victoria, to estimate demand for various land uses over a 15-year planning horizon and to inform the provisions of a revised Official Plan, Development Bylaw and associated mapping;
- Explore, stress, and assess the vitally important relationship between the Municipality and its commercial and service areas and the corresponding impact upon future land use needs and the supply of suitable land in a revised Official Plan and Development Bylaw;
- Prepare a revised Official Plan and Development Bylaw that facilitates orderly growth, preservation, sustainability and economic development and address the following matters:
 - Review and update of the existing Official Plan for the Municipality of Victoria, including its goals, objectives, policies and plan actions, present and future land use maps, and the timing of implementation;

- Review and update of the provisions of the existing Development Bylaw for the Municipality of Victoria, including but not limited to the requirements and processes pertaining to subdivision and development;
 - Ensure the development, over the life off the Official Plan and Development Bylaw, of a culturally and socially healthy community; and ensure any Heritage policy recommendations will be included in the Official Plan
- Ensure the revised Official Plan and Development Bylaw are internally consistent as well as consistent with other Municipality Bylaws and policies and Council’s priorities;
 - Ensure the revised Official Plan and Development Bylaw conform with Provincial Legislation, regulation and policy, as may be amended from time to time, in particular taking into account recent amendments to the Planning Act and the implications of the new Building Codes Act and Water Act;
 - Prepare and deliver all necessary documentation required by the Municipality of Victoria for the approval and enactment of the revised Official Plan and Development Bylaw;
 - Prepare and deliver all necessary mapping in a format appropriate to facilitate its update into the Municipality of Victoria’s GIS system;
 - Prepare and deliver a draft copy of the Official Plan and Development Bylaw in Microsoft Word and a PDF version;
 - Prepare and provide a final copy of the Official Plan and Development Bylaw in Microsoft Word and a PDF version;
 - Prepare, provide and deliver a presentation to Municipality Council at a public meeting on the completed project.

6.3 Documents

The following information and documents will be made available:

- Application and approval data regarding subdivision and development activity in the Municipality of Victoria, as available;
- Any relevant maps and plans, as available;
- Municipality of Victoria Zoning and Subdivision Control (Development) Bylaw, and amendments thereto;

- Municipality of Victoria Official Plan, and amendments thereto;
- Municipal Government Act; and
- Planning Act and Regulations and recent amendments thereto.

6.4 Selected Proponents Responsibilities

The Selected Proponents responsibilities will include, but not necessarily be limited to:

- Meet with Municipality staff and Planning Committee to discuss the project requirements and work plan at the commencement of the project;
- Review and assess all relevant data and documents;
- Consult and coordinate with all relevant provincial government staff to ensure that the draft and final deliverables meet all review requirements and comply with all applicable enactments, as necessary;
- Report to Municipality staff regarding the progress and completion of the work plan, as required;
- Fulfill the requirements of the project as listed in the Scope of Work/Deliverables (Section 6.2 of this RFP)

6.5 Municipality's Responsibilities

The Municipality's responsibilities will include:

- Review proposals and select successful proponent;
- Enter into negotiations with the successful proponent;
- Provide selected proponent with existing information and reports where available;
- Review all deliverables and provide comments to the selected proponent.

6.6 Project Submission Formats

Draft and final reports shall be formatted to standard size paper (8 1/2" x 11"), and may be double sided, unless otherwise directed.

6.7 Proposed Schedule

Request for Proposal Issued May 13 , 2019

Deadline for Inquiries May 20, 2019

Deadline for Issuing Addenda May 22, 2019

Submission of Proposal June 14, 2019

Award of Contract July 9, 2019

Submission of Draft Official Plan and Development Bylaw January 13, 2020

Submission of Final Official Plan and Development Bylaw March 6, 2020